

## Research Brief

### Balancing Personal and Professional Responsibilities

**Question:** What strategies do principals use to balance personal and professional responsibilities to maximize their effectiveness?

#### Summary of Findings:

##### **In a Nutshell**

A high school principal seldom has a day that goes according to plan. The principal's schedule more often than not, is dictated by others and routinely extends several hours beyond a regular school day. It is a job that could easily consume one's life, to the detriment of finding and maintaining any semblance of balance between their professional and personal lives. Although at times, work or personal life may take precedence due to specific circumstances and/or activities, striving for the equilibrium of a healthy and balanced life allows the principal to bring their best to school and real life, both of which will reap the benefits (Rauh, 2005).

The literature suggests several approaches that leaders can use to find the appropriate balance between personal and professional responsibilities. They include the following:

#### **Getting Started**

- Take thinking and planning time
  - Remember times that made you happy and brought you pleasure. What were you doing? With whom were you? Determine when you last had those experiences. Decide if you want to continue having those experiences (Smith; Hopkins, 2006).
- Maintain a log
  - For one week, keep a log of time spent on each activity. Although this may sound cumbersome, it will provide a realistic picture of how time is actually being utilized. How often are you dealing with crises? How much time is spent on the phone and with people who come by your office for "just a minute?" How many meetings and activities are you attending? How much time are you really spending on your top priorities? Are you eating lunch? How are your students benefiting from the time you are devoting to different activities (Smith)? How much time are you spending with your family and friends? Are you participating in any hobbies? Do you have "just me" time? How are you and your family benefiting from this time (Mayo Clinic Staff, Work-Life Balance)?

- Set goals
  - Establish 3-5 goals for your working and personal lives. Put those at the top of your priority list and continuously make certain your actions are aligned with them (Rauh, 2005).
- Organize your physical space
  - Eliminate clutter and organize things so they can be easily accessed and located (Magnunson, 2003).

### **Examine School Practices**

- Your secretary, your friend
  - Have your secretary sort your mail every day.
  - Meet with your secretary daily. Sign letters, address issues together and determine next steps.
  - Handle mail only once (Magnunson, 2003).
  - One suggestion from Hopkins (2006) was that staff make appointments to see the principal. While they are in the principal's office, the principal is fully present in his/her time with them.
- Create calendars
  - Construct a yearly calendar with the known activities to assist in anticipating events.
  - Develop a monthly calendar, complete with time designated to work on tasks, paperwork, budgets, staff development, visit classrooms, attend meetings, etc. (Magnunson, 2003).
  - Create a weekly calendar and establish priorities. Eliminate time wasters, do not over schedule or let non-emergency things disrupt the plan (Hopkins, 2006; Smith; Wuorio).
  - Evaluate your calendar frequently. Is the majority of your time being spent on the established goals (Mayo Clinic Staff, Work-Life Balance)?
- Where and when to work
  - Hopkins (2006) suggested that periodically, the principal take a day to work at home uninterrupted.
  - Other literature recommended keeping work at the office and not bringing it home. Spend a few extra hours one evening a week completing paperwork, putting things away and getting reorganized (Magnunson, 2003; Mayo Clinic Staff, Work-Life Balance; Smith).
  - 10 minute rule. Work on a dreaded task for 10 minutes a day, eventually it will be completed (Mayo Clinic Staff, Time Management).
  - Chunk work. Seldom does a principal have ample time to devote to a big project in one setting (Mayo Clinic Staff, Time Management; Rauh, 2005).
  - Do intense work when you are fresh and full of energy. Leave the easier and more mundane tasks for when you have a lower amount of energy (Magnunson, 2003).
- Additional tips

- Learn to say, "No." How does your participation directly affect the students? Be a committee member and not its chair.
- Delegate tasks to other faculty and staff. How can others help support the organization?
- Try to respond to routine emails and phone messages twice a day for a specified amount of time. Use email to communicate when appropriate.
- Be visible in school and at functions as time and activities allow.
- Select 1-2 tips/strategies and try them for 2-4 weeks. If they work, add another. If not, try a new one.
- Put a responsible person in charge when you are not there, then do not call in. If there is a problem, you will be contacted (Hopkins, 2007; Magnunson, 2003; Mayo Clinic Staff, Time Management; Rauh, 2005).

### **Personal Life**

- Scheduling
  - Meet regularly with your family and work out a schedule that includes who will cook, do specific chores and attend activities. The family must know they are a priority for you.
  - Meet your family and/or significant other for a meal in between activities.
  - Schedule time for the family to attend functions at school and perhaps help out (i.e. stuffing envelopes, chaperoning a function, answering phones, etc.)
  - Share your schedule with family so that know your professional commitments.
- Socializing
  - Spend time with people in other fields.
  - Set aside regular "date" time with your partner.
  - Spend quality time with members of your support group.
- Personal life
  - Set boundaries about your personal life and stick to them so that the job does not encroach on this time.
  - Get ample sleep, exercise and eat healthy.
  - Participate in household duties/chores (Hopkins, 2006; Mayo Clinic Staff, Time Management; Mayo Clinic Staff, Work-life balance; Smith; Wuorio).

### **Final Thoughts**

Most important is for each individual to find the balance they require between personal and professional responsibilities. The tools discussed earlier provide a way to make an assessment of need and to examine current practice. No one model fits all needs. Each leader must find the balance that fits their specific need.

**Resources:**

- Hopkins, G. (2007). *Marriage, family and the principalship: Making it all work—Part I & II*. Retrieved online from [http://www.education-world.com/a\\_admin/admin/admin478\\_a.shtml](http://www.education-world.com/a_admin/admin/admin478_a.shtml)  
This article provides different perspectives and suggestions on ways a principal can balance his/her life.
- Hopkins, G. (2006). *Principals offer practical, timely “time management” tips*. Retrieved online from [http://www.education-world.com/a\\_admin/admin/admin436\\_a.shtml](http://www.education-world.com/a_admin/admin/admin436_a.shtml)  
Suggestions on ways in which to effectively handle tasks and manage time are provided in this article.
- Magnuson, P. (2003, March). *Finding time*. Retrieved online from <http://www.naesp.org/ContentLoad.do?contentId=197>  
This is a brief descriptive list of ways in which a principal can effectively use their time.
- Mayo Clinic Staff. (n.d.). *Time management: Tips to reduce stress and improve productivity*. Retrieved online from <http://www.cnn.com/HEALTH/library/WL/00048.html>  
A list of several things one can do to provide more balance in their work life is provided in this article.
- Mayo Clinic Staff (n.d.). Work-life balance: Ways to restore harmony and reduce stress. Retrieved online from <http://www.mayoclinic.com/health/work-life-balance/WL00056>  
Things that contribute to life and work being out of balance are noted in this piece, along with suggestions for bringing equilibrium to one's life.
- Pounder, D. G. & Merrill, R. (2001, November). Redesigning the principalship could have a positive impact on the pipeline supply. *The School Administrator*. Retrieved online from <http://www.aasa.org/publications/saarticledetail.cfm?mnitemnumber=&tnitemumber=&itemnumber=3221&unitnumber=&pf=1&sitemnumber=>  
Issues dealing with reasons why more qualified people are not pursuing the high school principalship are explored in this article, along with some ideas about how to attract and train quality people to the job.
- Rauh, S. (2005). *5 tips for better work-life balance*. Retrieved online from <http://www.webmd.com/balance/guide/5-strategies-for-life-balance>  
This brief piece lists 5 questions one should ask him/herself and examine in order to establish a more balanced life.

- Smith, S. T. (n.d.). *7 tips for creating life-work balance*. Retrieved online from  
[http://www.lifescrpt.com/channels/healthy\\_living/Life\\_Tips/7\\_tips\\_for\\_creating\\_a\\_work-life\\_balance.asp?trans=1&du=1&gclid=COWijvr-zpQCFQOaFQodASoAIQ&ef\\_id=1350:3:c\\_560e1a30697bceaae078b23acd3a3b2\\_1040046185:70iXzko-JyoAAEScW6oAAAAO:20080720172935](http://www.lifescrpt.com/channels/healthy_living/Life_Tips/7_tips_for_creating_a_work-life_balance.asp?trans=1&du=1&gclid=COWijvr-zpQCFQOaFQodASoAIQ&ef_id=1350:3:c_560e1a30697bceaae078b23acd3a3b2_1040046185:70iXzko-JyoAAEScW6oAAAAO:20080720172935)  
This article addresses issues that more women than men typically tend to face. It provides succinct tips on providing balance to one's life.
- Vann, A. S. (2004, May/June). *Do it yourself*. Retrieved online from  
<http://www.naesp.org/ContentLoad.do?contentId=1245>  
A short piece written by a retired principal who briefly describes how and why he managed in the style in which he did.
- Wuorio, J. (n.d.). *Need work-life balance? 7 tips*. Retrieved online from  
<http://www.microsoft.com/smallbusiness/resources/management/leadership-training/need-work-life-balance-7-tips.aspx#Needworklifebalancetips>  
7 tips to providing more balance in one's life are concisely provided in this article.

---

Submitted Date: 7/23/08      By: Dr. Karen Walker Lebanon Valley College

This brief is provided as a service to educators by Education Partnerships, Inc, which does not assume any responsibility for the content of the brief or the positions taken by the authors or the Web sites or other authors whose works are included. This research brief reflects information currently available and is not the official position of Education Partnerships, Inc.

Disclaimer: All URLs listed in this site have been tested for accuracy, and contents of Web sites examined for quality, at the time of addition. Content accuracy and appropriateness, however, cannot be guaranteed over time as Web sites and their contents change constantly. The author takes no responsibility for difficulties that may result from the use of any Web site listed herein. Please notify the [Webmaster](#) if you find any dead links or inappropriate material.

Permission: You may use or download content for research or educational purposes, or for your personal, noncommercial purposes, provided you keep unchanged all copyright and other notices with them. No other use of any content is permitted. You agree that you will make only lawful use of this research brief, and will only use these briefs in compliance with all federal, state and local laws and regulations. You agree that you will make no use of the research that violates anyone else's rights, including copyright, trademark, trade secret, right of privacy, right of publicity or other rights.